



INLS 244: Digital Preservation and Access

The Instructor.

Dr. Helen R. Tibbo

☎: 962-8063(w); 929-6248(h)

💻: Tibbo@ils.unc.edu

Office: 201 Manning Hall

FAX #: (919) 962-8071

Office Hours.

I will definitely be in my office Wednesday 2:00 – 4:00 and much of the rest of the time. Please feel free to drop by for random or chance meetings, or send me an e-mail message for a more definite scheduling opportunity. My door is often closed, but just knock!

Course Timeline.

First Class: Wednesday, January 7, 2003.

Last Regular Class: Monday, April 19, 2003.

Monday, April 26, 2003, Noon to 2:00 PM: During our scheduled final exam period we will be reviewing each group's grant proposals as a final session and selecting 3 or 4 of the 9 or 10 for "funding."

Brief Course Description.

This course focuses on integrating state-of-the-art information technologies, particularly those related to the digitization chain, into the daily operations of archives, records centers, museums, special collections libraries, visual resource collections, and historical societies. Issues, topics, and technologies covered will include the promise & challenge of long-term digital preservation; approaches to preservation; digitizing text, photographs, maps, slides, sound, and video; optical character recognition programs; image processing; selecting materials for digitization and managing digitization projects; digital benchmarking, resource allocation and costing, risk management, digitization and metadata; rights management and other legal and ethical issues; digital asset management; standards; file formats; quality control; funding for developing and sustaining digitization projects and programs; and trusted repositories.

Goals and Objectives.

By the end of the course, the student should be able to:

- ✚ Explain the digitization workflow and all the steps involved in major digitization projects.
- ✚ Be familiar with best practice guidelines and organizations that are creating them.

- ✚ Select materials for digitization projects and provide sound justifications for these selections.
- ✚ Select and justify standards and benchmarks for a given digitization project.
- ✚ Create appropriate metadata for digital objects for access, management, and preservation purposes.
- ✚ Determine the costs of digitization projects and plan appropriate facilities and resources.
- ✚ Scan a variety of text and image objects and process the images with software such as Photoshop.
- ✚ Use Optical Character Recognition (OCR) software.
- ✚ Understand how to manage a digitization project including assessing risk and establishing a quality control program.
- ✚ Write a well-argued and constructed grant proposal for a digitization project.

Format.

Most learning occurs when you integrate a new concept into your personal experiences, beliefs, and understandings. As such, much of the course will focus on applying readings through case studies, group projects, and class discussion. I, or a guest, will present material at the beginning of many classes, but lectures are generally an ineffective method of learning and these will be kept to a minimum. Frequently we will discuss the topic(s) and readings and have a “practical” session that will involve either hands-on work, a demo of a particular software package or technical process, a presentation from a guest, or a visit to a repository. Note that a discussion of the topics requires class participation.

Assignments & Evaluation.

Due to the nature of this course, positive and active participation is required. Positive and active participation is characterized by having a clear command of the readings for the day, sharing analyses and options based on the readings, project guidelines, and case studies; allowing other students the opportunity to participate; and freely agreeing and disagreeing with others when warranted. Please note that an intellectual exchange of ideas is the cornerstone of education, but any criticism should be limited to an idea and not the person specifically.

<i>Assignment</i>	<i>% of Grade</i>	<i>Due Date</i>
Paper (10-15 pages)	25	February 25
Grant Project Progress Report/Mtg.	10	March 17
Grant Proposal and Presentation	35	April 12, 14 & 19
Evaluation of Proposals	10	April 26, noon via email
Site Evaluations (1)	10	Throughout term
Class Participation	10	Throughout term

Textbook and Readings.

The textbook required for this class is: Kenny, Anne R. & Oya Rieger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000. This is available at the RLG website. <http://www.rlg.org>. You need to order this on your own (if we ordered it in the bookstore it would more expensive). It will take a week or so to receive this from RLG. There will also be a copy on reserve in the SILS Library. We will also be reading several other items, especially documenting digitization projects.

Most of these materials will be available on the Web with some on reserve in the SILS Library. In particular, you will be reading most of the *NINCH Guide to Good Practice*, available at <http://www.nyu.edu/its/humanities/ninchguide>. See weekly calendar below.

Honor Code.

This class strictly follows the Honor Code. Information on the Honor Code can be found at: <http://honor.unc.edu/honor/code.html>.

As the Semester Begins....

- 1) If you are not familiar with Photoshop, go to the UNC-CH ATN website: <http://help.unc.edu>. Go to software and then Photoshop and version 7.0 documents for “introduction” and “image correction.” We will be using version 7.0 in the lab, but will not spend a lot of time on the intricacies of learning the software.
- 2) Go to Cornell University Library’s Preservation Department’s website and run through the *Moving Theory into Practice* Online Tutorial. <http://www.library.cornell.edu/preservation/tutorial/contents.html>. Most of this is assigned throughout the semester, but it will give you a bit of an overview introduction if you do it up front before the heavy work of the semester starts. You will also be using the Cornell tutorial on Digital Preservation Management. <http://www.library.cornell.edu/iris/tutorial/dpm/index.html>.
- 3) Pick out what you want to do for your paper (no more than 15 double-spaced pages each). This paper is meant as a literature review and a way for you to focus a bit more on one topic and the associated issues. You can select anything related to digitization project or, more broadly, digital preservation and access, but not one you covered in Dr. Conway’s course. Some of these topics could easily be developed into master’s papers. Here are some topics to get you started thinking:
 - a. Saving the bits: the range of technical options.
 - b. Saving the bits: emulation vs. migration.
 - c. Preservation aspects of early digitization projects? Was preservation considered?
 - d. Preservation vs. access. Are these two still in opposition?
 - e. Funding futures for digitization projects.
 - f. The metadata maze: How much do we really need?
 - g. The metadata maze: What are repositories really doing?
 - h. EAD. Is it the universal encoding answer?
 - i. How can little repositories play in the digital arena?
 - j. XML. Is it the preservation and access answer?
 - k. How do you best select equipment?
 - l. How are digital archives different from digital libraries?
 - m. What is the purpose of digitization?
 - n. What is the state of the art of DAMS?
 - o. Is there a role for selection in the days of inexpensive mass storage?
 - p. Which costs more to maintain: Digital or paper publications?
 - q. File formats and a file format registry.
 - r. Color management.
 - s. Digital capture: key elements of hardware and software.
 - t. Searching for and retrieving digital content on the web.
 - u. Image consortia: how are these organizations working?
 - v. Methods for user assessment of digital cultural heritage assets.

Weekly Course Calendar.

1. Wednesday, January 7:

- A. Introduction to the class, instructor, and students. We will discuss how we want to conduct the class and the nature of the assignments and the expectations of all of us. What do we value in class participation?
- B. Framework for semester. Overseeing digital assets from planning and resource allocation through creation, management, delivery and preservation.
- C. The Digital Library; The Digital Archive. What are they? How are they different?
 - ✚ Waters, Don. "What Are Digital Libraries?" *CLIR Issues* 4 (July/August 1998): 1, 5-6.
[\[http://www.clir.org/pubs/issues/issues04.html\]](http://www.clir.org/pubs/issues/issues04.html)
- D. Guides to Good Practice.
 - ✚ Arts and Humanities Data Service. "Guides to Good Practice."
<http://ads.ahds.ac.uk/project/goodguides/g2gp.html>
 - ✚ Colorado Digitization Project, "Digital Toolbox"
<http://www.cdpheritage.org/resource/index.html>
 - ✚ NARA Guidelines for Digitizing Archival Materials for Electronic Access.
http://www.archives.gov/research_room/arc/arc_info/guidelines_for_digitizing_archival_materials.pdf
 - ✚ Northeast Document Conservation Center. *Handbook for Digital Projects: A Management Tool for Preservation and Access*. Andover, MA: NEDCC, 2000.
<http://www.nedcc.org/digital/dman.pdf>
 - ✚ NINCH Guide to Good Practice. Chapter 1. "Introduction."
<http://www.nyu.edu/its/humanities/ninchguide/I/>
 - ✚ See *NINCH* Guide and list of introductory texts and Websites for additional guides.
 - ✚ UNESCO. "Guidelines for the Preservation of Digital Heritage."
<http://unesdoc.unesco.org/images/0013/001300/130071e.pdf>

Assignments:

- ✚ Create groups of 3 for term project. Begin to discuss what you would like to do as a group for the project.
- ✚ Bring in photos, maps, & other documents for use in lab-work.
- ✚ Start to think about topics for the term paper.

2. Monday, January 12:

Digital Imaging: Key Concepts and Vocabulary.

- ✚ Besser, Howard and Jennifer Trant. *Introduction to Imaging: Issues in Construction an Image Database*. Malibu, CA: Getty Information Institute, 1996.
<http://www.getty.edu/research/institute/standards/introimages/>. Please read entire booklet; only 48 pages.
- ✚ Cornell University Library. "Digital Preservation Management: Implementing Short-term Strategies for Long-term Problems." Chapter 1: Introduction & Chapter 2: Terms and Concepts. <http://www.library.cornell.edu/iris/tutorial/dpm/terminology/index.html> See also their list of online glossaries.
- ✚ "Glossaries," PADI: Preserving Access to Digital Information.
<http://www.nla.gov.au/padi/format/gloss.html>. Browse.
- ✚ "Glossary," in *Digital Toolbox* (Colorado Digitization Project).
http://www.cdpheritage.org/resource/introduction/rsrc_glossary.html. Browse.
- ✚ Moving Theory Into Practice Digital Imaging Tutorial, Chapter 1: "Basic Terminology."
<http://www.library.cornell.edu/preservation/tutorial/intro/intro-01.html>

3. Wednesday, January 14:

Practicals #1&2: Image Capture & Enhancement. Meet in room 117. Bring photographs to be digitized and enhanced.

*. Monday, January 19: Martin Luther King Day. No Class.

4. Wednesday, January 21:

A. Permanence: An Enduring Theme.

- ✚ O'Toole, James M. "On the Idea of Permanence." *American Archivist* 52 (Winter 1989): 10-25.

B. Digital Preservation & Longevity: The Challenges, The Situation.

- ✚ Cornell University. Digital Preservation Management Tutorial: Implementing Short-term Strategies for Long-term Problems.
<http://www.library.cornell.edu/iris/tutorial/dpm/timeline/index.html>
- ✚ Hedstrom, Margaret. "Research Agendas Set Course for Digital Archiving and Long-Term Preservation." *RLG DigiNews*. 7/6 (December 15, 2003).
<http://www.rlg.org/preserv/diginews/diginews7-6.html#feature2>
- ✚ Martin, Julia and David Coleman. "The Archive as an Ecosystem." *The Journal of Electronic Publishing* 7/3 (April 2002) <http://www.press.umich.edu/jep/07-03/martin.html>
- ✚ Moving Theory into Practice Digital Imaging Tutorial," Chapter 8.
<http://www.library.cornell.edu/preservation/tutorial/preservation/preservation-01.html>.
- ✚ *NINCH Guide to Good Practice*. Chapter 14. "Preservation."
<http://www.nyu.edu/its/humanities/ninchguide/XIV/>.
- ✚ Tibbo, Helen R. "On the Nature and Importance of Archiving in the Digital Age." In *Advances in Computing* v. 57. Elsevier, 2003.
- ✚ UNESCO. "Charter on the Preservation of the Digital Heritage."
http://portal.unesco.org/ci/file_download.php/Charter_en.pdf?URL_ID=8967&file_name=10696846891Charter_en.pdf&filetype=application%2Fpdf&filesize=16688&name=Charter_en.pdf&location=user-S/&PHPSESSID=abd1354bdd9b963302a003a31623e527

5. Monday, January 26:

Approaches to Preservation.

- # ADHS. "Excavating Data: Retrieving the Newham Archive." (May 31, 2001).
<http://ahds.ac.uk/creating/case-studies/newham/index.htm>
- # Mellor, Phil. "CAMiLEON: Emulation and BBC Domesday." *DigiNews* 7/2 (April 2003). <http://www.rlg.org/preserv/diginews/diginews7-2.html#feature3>
- # Thibodeau, Kenneth. "Overview of Technological Approaches to Digital Preservation and Challenges in Coming Years." *In The State of Digital Preservation: An International Perspective*. Conference Proceedings. Washington, D.C., Documentation Abstracts, Inc. Institutes for Information Science, April 24-25, 2002. Council on Library and Information Resources, Washington, D.C.
<http://www.clir.org/pubs/abstract/pub107abst.html>
- # Hamilton, Christopher. "XML/XSLT-Mediated File Format Migration as a Digital Preservation Strategy." *RLG DigiNews* 7/4 (August 2003).
<http://www.rlg.org/preserv/diginews/diginews7-4.html#faq>

6. Wednesday, January 28:

Standards, Storage Media, and File Formats.

- # Brown, Adrian. *Selecting Storage Media for Long-Term Preservation*. London: The National Archives (June 19, 2003)
<http://www.pro.gov.uk/about/preservation/digital/guidance/selecting-storage-media.pdf>
- # Darlington, Jeffrey. "PRONOM—A Practical Online Compendium of File Formats." *RLG DigiNews* 7/5 (October 15, 2003).
<http://www.rlg.org/preserv/diginews/diginews7-5.html#feature2>
- # LeFurgy, William G. "PDF/A: Developing a File Format for Long-Term Preservation." *RLG DigiNews* 7/6 (December 15, 2003).
- # Puglia, Steve. "Creating Permanent and Durable Information: Physical Media and Storage Standards." *CRM: Cultural Resource Management* 22/2 (1999): 25-27.
<http://crm.cr.nps.gov/archive/22-2/22-02-10.pdf>
- # <http://www.rlg.org/preserv/diginews/diginews7-6.html#feature1>
- # Waibel, Günter. "Like Russian Dolls: Nesting Standards for Digital Preservation." *DigiNews* 7/3 (June 2003). <http://www.rlg.org/preserv/diginews/diginews7-3.html#feature2>

7. Monday, February 2:

Project Planning & Workflow.

- # Arts & Humanities Data Service. "Digitisation: A Project Planning Checklist." <http://ahds.ac.uk/checklist.htm>.
- # IMLS Forum. [A Framework of Guidance for Building Good Digital Collections](#) December 2001.
- # Library of Congress. "Steps in Digitization." <http://lcweb2.loc.gov/ammem/award/docs/stepsdig.html&http://memory.loc.gov/ammem/prjplan.html>
- # NINCH *Guide to Good Practice*. Chapter 2. "Project Planning." <http://www.nyu.edu/its/humanities/ninchguide/II/>.
- # "Questions to Consider Before Beginning an Image Database Project." University of Illinois Library, Digital Imaging & Media Technology Initiative. <http://images.library.uiuc.edu/resources/20questns.html>.
http://www.tasi.ac.uk/advice/managing/jidi_workflow.html

8. Wednesday, February 4:

Grant Writing and Funding Sources.

- # Miner, Lynn E., Jeremy T. Miner, & Jerry Griffith. *Proposal Planning and Writing*. 2nd ed. Phoenix, AZ: Oryx, 1998. Browse entire book; use for term project. On reserve.
- # Institute for Museum and Library Services. Website <http://www.ims.gov/grants/appl/index.htm>.
- # Library of Congress. National Digital Library Program. "NDLP Project Planning Checklist." [Memory.loc.gov/ammem/prjplan.html](http://memory.loc.gov/ammem/prjplan.html).
- # National Archives and Records Administration, National Historic Publications and Records Commission, funding program: http://www.archives.gov/nhprc_and_other_grants/index.html
- # National Endowment for the Humanities. <http://www.neh.gov>.

9. Monday, February 9:

A. Purpose: Why digitize?

- # Conway, Paul. "II. Overview: Rationale for Digitization and Preservation," *Handbook for Digital Projects: A Management Tool for Preservation and Access*. Andover, MA: NEDCC, 2000. <http://www.nedcc.org/digital/dighome.htm>.
- # Hazen, Dan, Jeffrey Horrell, and Jan Merrill-Oldham. "A Decision-Making Matrix" from *Selecting Research Collections for digitization*, (Washington, DC: CLIR, 1998). <http://www.clir.org/pubs/reports/hazen/matrix.html>.
- # Kenney, Anne R. and Oya Y. Rieger. "Introduction." *Moving Theory into Practice*. Mountain View, CA: RLG, 2000, 1-10.

- ✚ NINCH *Guide to Good Practice*. Chapter 3. “Selecting Materials: An Iterative Process.” <http://www.nyu.edu/its/humanities/ninchguide/III/>.
 - ✚ Smith, Abby. “Why Digitize?” Washington, D.C.: Council on Library and Information Resources, 1998. <http://www.clir.org/pubs/reports/pub80-smith/pub80.html>
- B. Overview of Selection Principles.
- ✚ DeStefano, Paula. Chapter 2: “Selection for Digital Conversion,” In: Kenney, Anne R. & Oya Reiger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000, 11-23.
 - ✚ Work through the “Moving Theory Into Practice Digital Imaging Tutorial,” Chapter 2. <http://www.library.cornell.edu/preservation/tutorial/selection/selection-01.html>
- C. Practical #3: Examine the selection criteria from the following actual projects. See other project from reading list under “Selection for digitization: selection policies.”
- ✚ Columbia University, Digital Library Collections. “Selection Criteria for Digital Imaging Projects.” <http://www.columbia.edu/cu/libraries/digital/criteria.html>.
 - ✚ Thompson, Kim. University of California Selection Criteria for Digitization. October 1998. <http://www.library.ucsb.edu/ucpag/digselec.html>.
 - ✚ Library of Congress, Preservation Reformatting Division. Selection Criteria for Preservation Digital Reformatting, December 1999. <http://lcweb.loc.gov/preserv/prd/presdig/pressselection.html>
 - ✚ National Library of Australia. Digitisation Policy, 2000-2004. <http://www.nla.gov.au/policy/digitisation.html>

10. Wednesday, February 11:

- A. Practical #4: Evaluating/selecting materials for digitization. Meet in North Carolina Collection reading room.
- ✚ **Assignment:** Work with your partner on selecting the 3 best and 3 worst candidate items for digitization from Lab #4. Provide rationales for or against digitizing all items for next week. Each pair should send me the selections via email by Friday February 13 at noon.

11. Monday, February 16:

- B. Digitization of Textual Resources, OCR, and Encoding.
- ✚ Chapman, Stephen. “Working with Printed Text and Manuscripts.” *Handbook for Digital Projects: A Management Tool for Preservation and Access*. Andover, MA: NEDCC, 2000. <http://www.nedcc.org/digital/dman.pdf>.
 - ✚ Price-Wilkin, John. Chapter 6: “System Building and Image Processing,” In: Kenney, Anne R. & Oya Reiger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000, 101-118.
 - ✚ Fenton, Eileen G. “An OCR Case Study.” *Handbook for Digital Projects: A Management Tool for Preservation and Access*. Andover, MA: NEDCC, 2000.

<http://www.nedcc.org/digital/dman.pdf>.

- # Kenney, Anne R. & Stephen Chapman. *Digital Imaging for Libraries and Archives*. Ithaca, NY: Department of Preservation & Conservation, 131-137. On reserve.
- # *NINCH Guide to Good Practice*. Chapter 5. "Digitization and Encoding of Text." <http://www.nyu.edu/its/humanities/ninchguide/V/>.
- # DigiCult Technology Watch Briefing 7: The XML Family of Technologies. <http://www.digicult.info/pages/twbview.php?doc=1056724258&twb=y&email=tibbo@ils.unc.edu>

See also:

- # "A Gentle Introduction to SGML," (Chapter two of Guidelines for Electronic Text Encoding and Interchange (TEI P3)) edited by C. M. Sperberg-McQueen and Lou Burnard <http://www.tei-c.org/Guidelines2/gentleintro.pdf> Browse.
- # The Text Encoding Initiative: <http://www.tei-c.org/>. Browse.
- # There is already an enormous literature concerning XML and RDF. See the OASIS SGML/XML Web Page by Robin Cover for extensive explanations, bibliographies, standards, and position papers at: <http://www.oasis-open.org/cover/xml.html> and <http://www.oasis-open.org/cover/rdf.html>.

12. Wednesday, February 18:

- A. Discuss Practical #4: Evaluation/selection of materials for digitization.
- B. Practical #5: Digitization of Textual Resources and OCR.

13. Monday, February 23:

- A. Hardware & Accessories.
 - # Williams, Don. "Debunking of Specsmanship: Progress on ISO/TC42 Standards for Digital Capture Imaging Performance." *RLG DigiNews* 7/1 (February 15, 2003). <http://www.rlg.org/preserv/diginews/diginews7-1.html#feature1>
 - # Williams, Don. "Recent Developments and Improvements in Hardware for Scanners and Digital Cameras." *RLG DigiNews* 7/5 (October 15 2003). <http://www.rlg.org/preserv/diginews/diginews7-5.html#faq>
 - # Williams, Don. "Selecting a Scanner." <http://www.rlg.org/visguides/visguide2.html>
 - # Vitale, Timothy. "Color Targets." October 2003. <http://palimpsest.stanford.edu/byauth/vitale/color-targets/>

14. Wednesday, February 25:

A. Benchmarking & Quality Control.

- ✚ Kenney, Anne R. Chapter 3: "Digital Benchmarking for Conversion and Access." In: Kenney, Anne R. & Oya Reiger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000, 24-60.
- ✚ Kenney, Anne R. & Stephen Chapman. *Digital Imaging for Libraries and Archives*. Ithaca, NY: Department of Preservation & Conservation, 1-35. On reserve.
- ✚ "Moving Theory into Practice Digital Imaging Tutorial," Chapter 4.
<http://www.library.cornell.edu/preservation/tutorial/quality/quality-01.html>.
- ✚ "Moving Theory Into Practice Digital Imaging Tutorial," Chapter 3.
<http://www.library.cornell.edu/preservation/tutorial/conversion/conversion-01.html>
- ✚ NINCH Guide to Good Practice. Chapter 6. "Capture and Management of Images."
<http://www.nyu.edu/its/humanities/ninchguide/VI/>.
- ✚ NINCH Guide to Good Practice. Chapter 8. "Quality Control and Assurance."
<http://www.nyu.edu/its/humanities/ninchguide/VIII/> .
- ✚ Rieger, Oya Y. Chapter 4: "Establishing a Quality Control Program." In: Kenney, Anne R. & Oya Reiger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000, 61-83.
- Reilly, J.M., & F.S. Frey. Recommendations for the Evaluation of Digital Images Produced from Photographic, Micrographic, and Various Paper Formats. Report to the Library of Congress, National Digital Library Project. <http://lcweb2.loc.gov/ammem/ipirpt.html>
- ✚ **DUE: Term Papers.**

15. Monday, March 1:

A. Audio/Video Digitization.

- ✚ Brylawski, Samuel. "Preservation of Digitally Recorded Sound." In *Building a National Strategy for Preservation: Issues in Digital Media Archiving*. Washington, D.C.: CLIR, April 2002. <http://www.clir.org/pubs/reports/pub106/sound.html>
- ✚ Colorado Digitization Project. *Colorado Digitization Project: Digital Audio Guidelines: Draft*. July 2002. http://www.cdpheritage.org/resource/audio/std_audio.htm
- ✚ NINCH Guide to Good Practice. Chapter 7. "Audio/Video Capture and Management."
<http://www.nyu.edu/its/humanities/ninchguide/VII/>
- ✚ Ide, Mary, Dave MacCarn, Thom Shepard, and Leah Weisse. "Understanding the Preservation Challenge of Digital Television." In *Building a National Strategy for Preservation: Issues in Digital Media Archiving*. Washington, DC: CLIR, April 2002.
<http://www.clir.org/pubs/reports/pub106/television.html>
- ✚ Wactlar, Howard D. and Michael G. Christel. "Digital Video Archives: Managing Through Metadata." In *Building a National Strategy for Preservation: Issues in Digital Media Archiving*. Washington, DC: CLIR, April 2002. <http://www.clir.org/pubs/reports/pub106/video.html>
- ✚ WGBH. UPF (Universal Preservation Format) Home Page. This initiative advocates a platform-independent format that will help make accessible a wide range of data types. The UPF is characterized as "self-described" because it includes, within its metadata, all the technical specifications required to build and rebuild appropriate media browsers to access contained materials throughout time. <http://info.wgbh.org/upf/>

16. Wednesday, March 3:

Working with Vendors.

- ✚ RLG Guidelines for Creating a Request for Proposal for Digital Imaging Services. <http://www.rlg.org/preserv/RFPGuidelines.pdf>.
- ✚ ✚ RLG Model Request for Information. (RFI) <http://www.rlg.org/preserv/RLGrfi.pdf>.
- ✚ RLG Model Request for Proposals. (RFP) <http://www.rlg.org/preserv/RLGModelRFP.pdf>.

17. Monday, March 15:

A. Metadata for Access, Management, and Preservation.

- ✚ Gilliland-Swetland, Anne. "Introduction to Metadata: Setting the Stage," Getty Research Institute, 1999. <http://www.getty.edu/research/institute/standards/intrometadata/>
- ✚ Lagoze, Carl & Sandra Payette. Chapter 5: "Metadata: Principles, Practices, & Challenges," In: Kenney, Anne R. & Oya Reiger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000, 84-100.
- ✚ RLG. "To Have and to Hold: Metadata and Institutional Repositories." <http://www.rlg.org/events/haveandhold2003/index.html>
- ✚ RLG. "Ready to Wear: Metadata Standards to Suit Your Project." <http://www.rlg.org/events/metadata2003/>
- ✚ RLG. "RLG-CIMI Forum Provides a Guide to New Metadata Standards." <http://www.rlg.org/events/metadata2003/summary.html>
- ✚ LC Metadata Website: <http://lcweb.loc.gov/standards/metadata.html>.
- ✚ Moving Theory Into Practice Digital Imaging Tutorial," Chapter 5. <http://www.library.cornell.edu/preservation/tutorial/metadata/metadata-01.html>. *NINCH Guide to Good Practice*. "Appendix B: Metadata." <http://www.nyu.edu/its/humanities/ninchguide/appendices/metadata.html>
- ✚ OCLC/RLG. PREMIS (PREservation Metadata Implementation Strategies). <http://www.oclc.org/research/projects/pmwg/>
- ✚ OCLC Website for Dublin Core materials: <http://purl.org/DC/>

B. Practical #6: Digitization and Metadata.

18. Wednesday, March 17:

Meetings with instructor regarding progress on grant project. Each team will meet in my office between Tuesday, March 16 and Thursday March 18.

DUE: Project Progress Report.

19. Monday, March 22:

B. Copyright and Rights Management.

- # Balas, Janet. "Copyright in the Digital Era." *Computers in Libraries* 18/6 (June 1998): 38-40. <http://www.infotoday.com/cilmag/jun98/story2.htm>.
- # Besek, June M. *Copyright Issues Relevant to the Creation of a Digital Archive: A Preliminary Assessment* January 2003. <http://www.clir.org/pubs/abstract/pub112abst.html>
- # "Finding Your Way Out of the Copyright Maze." *Library Resources & Technical Services* 41/4 (October 1998). <http://www.infotoday.com/cilmag/jun98/story1.htm>
- # Hirtle, Peter. "The Impact of the Librarian of Congress's Rulemaking on the Digital Millennium Copyright Act." *RLG DigiNews* 7/6 (December 15, 2003). <http://www.rlg.org/preserv/diginews/diginews7-6.html#faq>
- # *NINCH Guide to Good Practice*. Chapter 4. "Rights Management." <http://www.nyu.edu/its/humanities/ninchguide/IV/>.
- # Oppenheim, C. "Copyright in the Electronic Age." In UNESCO *World Information Report*. Paris: Unesco, 1997. http://www.unesco.org/webworld/com_inf_reports/wirenglish/chap26.pdf .

20. Wednesday, March 24:

A. Digital Asset Management Systems, Web Delivery, & Retrieval.

- # Hirtle, Peter B. Chapter 7: "Image Management Systems and Web Delivery," In: Kenney, Anne R. & Oya Reiger, eds. *Moving Theory into Practice*. 119-134.
- # Kenney, Anne R. & Stephen Chapman. *Digital Imaging for Libraries and Archives*. Ithaca, NY: Department of Preservation & Conservation, 161-174. On reserve
- # "Moving Theory Into Practice Digital Imaging Tutorial," Chapter 7. <http://www.library.cornell.edu/preservation/tutorial/presentation/presentation-01.html>
- # *NINCH Guide to Good Practice*. Chapter 13. "Digital Asset Management." <http://www.nyu.edu/its/humanities/ninchguide/XIII/> .
- # *NINCH Guide to Good Practice*. Chapter 10. "Distribution." <http://www.nyu.edu/its/humanities/ninchguide/X/>.

B. Database Management for Documenting the American South.

21. Monday, March 29:

B. How Much Does This All Cost?

- ✚ Bonn, Maria. Benchmarking Conversion Costs: A Report from the Making of America IV Project. RLG DigiNews October 15, 2002.
<http://www.rlg.org/preserv/diginews/diginews5-5.html#feature2>
- ✚ Chapman, S. "Counting the Costs of Digital Preservation: Is Repository Storage Affordable?" *Jodi* 4/2 (May 2003)
<http://jodi.ecs.soton.ac.uk/Articles/v04/i02/Chapman/> &
<http://jodi.ecs.soton.ac.uk/Articles/v04/i02/Chapman/chapman-final.pdf>.
- ✚ Connaway, Lynn S. and Stephen R. Lawrence. "Comparing Library Resource Allocations for the Paper and the Digital Library: An Exploratory Study." *DLib Magazine*, December 2003. <http://www.dlib.org/dlib/december03/connaway/12connaway.html>.
- ✚ Kenney, Anne R. Chapter 9: "Project to Programs: Mainstreaming Digital Imaging Initiatives," In: Kenney, Anne R. & Oya Reiger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000, 153-176.
- ✚ LaVoie, Brian and Lorcan Dempsey (2004) "Thirteen Ways of Looking at...Digital Preservation." *D-LibMagazine* 10(7/8).
- ✚ NINCH Symposium: The Price of Digitization: New Cost Models for Cultural and Educational Institutions. (April 8, 2003) <http://www.ninch.org/forum/price.report.html>
- ✚ Puglia, Steve. "The Costs of Digital Imaging Projects." *RLG DigiNews* October 1999.
<http://www.rlg.org/preserv/diginews/diginews3-5.html#feature>.
- ✚ RLG Worksheet for Estimating Digital Reformatting Costs.
<http://www.rlg.org/preserv/RLGWorksheet.pdf>.
- ✚ Sanett, Shelby. "The Cost to Preserve Authentic Electronic Records in Perpetuity: Comparing Costs across Cost Models and Cost Frameworks."
<http://www.rlg.org/preserv/diginews/diginews7-4.html#feature2>
- ✚ Tanner, Simon and Joanne Lomax Smith, "Digitisation: How Much Does It Really Cost?" (paper for the Digital Resources for the Humanities 1999 Conference, September 12-15, 1999). <http://heds.herts.ac.uk/resources/papers/drh99.pdf>

22. Wednesday, March 31:

Project & Risk Management.

- ✚ Moving Theory Into Practice Digital Imaging Tutorial, Chapter 9. "Management."
<http://www.library.cornell.edu/preservation/tutorial/management/management-01.html>.
- ✚ Kenney, Anne R. Chapter 9: "Project to Programs: Mainstreaming Digital Imaging Initiatives," In: Kenney, Anne R. & Oya Reiger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000, 153-176.
- ✚ *NINCH Guide to Good Practice*. Chapter 9. "Working with Others."
<http://www.nyu.edu/its/humanities/ninchguide/IX/>.

23. Monday, April 5:

A. Evaluation.

- ✚ *NINCH Guide to Good Practice*. Chapter 12. “Assessment of Projects by User Evaluation.” <http://www.nyu.edu/its/humanities/ninchguide/XII/> .
- ✚ Heath, F., M. Kyrillidou, D. Webster, S. Choudhury, B. Hobbs, M. Lorie, and N. Flores. Emerging Tools for Evaluating Digital Library Services: Conceptual Adaptations of LibQUAL+ and CAPM. *JoDI* 4/2 (June 2003). <http://jodi.ecs.soton.ac.uk/Articles/v04/i02/Heath/>

B. Practical #7: Site Evaluation.

24. Wednesday, April 7:

Projects to Programs: Policies, Sustainability, and New Directions.

- ✚ Barton, M. and J. Walker. “Building a Business Plan for DSpace, MIT Libraries Digital Institutional Repository.” *JoDI* 4/2 (May 2003). <http://jodi.ecs.soton.ac.uk/Articles/v04/i02/Barton/> & <http://jodi.ecs.soton.ac.uk/Articles/v04/i02/Barton/barton-final.pdf>
- ✚ *NINCH Guide to Good Practice*. Chapter 11. “Sustainability: Models for Long-Term Funding.” <http://www.nyu.edu/its/humanities/ninchguide/XI/>.
- ✚ Reiger, Oya Y. Chapter 8: “Project to Programs: Developing a Digital Preservation Policy,” In: Kenney, Anne R. & Oya Reiger. *Moving Theory into Practice*. Mountain View, CA: RLG, 2000, 135-152.
- ✚ Zorich, Diane M. *A Survey of Digital Cultural Heritage Initiatives and Their Sustainability Concerns*. Washington, D.C.: CLIR, June 2003. <http://www.clir.org/pubs/abstract/pub118abst.html>

25. Monday, April 12:

- ✚ Student presentations of grant proposals. 15 minutes of presentation & 5 minutes of questions for each group; 4 groups to present today.
- ✚ **Assignment:** Review grant proposals.
- ✚ **Due:** Proposals for groups presenting.

26. Wednesday, April 14:

- ✚ Student presentations of grant proposals. 15 minutes of presentation & 5 minutes of questions for each group; 3 groups to present today.
- ✚ **Assignment:** Review grant proposals.
- ✚ **Due:** Proposals for groups presenting.

27. Monday, April 19:

- ✚ Student presentations of grant proposals. 15 minutes of presentation & 5 minutes of questions for each group; 3 groups to present today.
- ✚ **Assignment:** Review grant proposals.
- ✚ **Due:** Proposals for groups presenting.

28. Wednesday, April 21: No Class.

- ✚ **Due Wednesday 4/21 via email:** Comments on grant proposals.

29. Monday, April 26: Noon to 2:00

Grant funding review of student proposals.